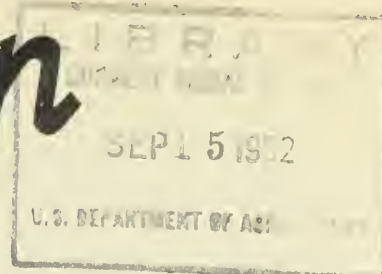


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Foreign



CROPS AND MARKETS



VOLUME 65

NUMBER 9

FILBERTS (Page 183) BEAN EXPORTS (Page 192)

GRAIN STOCKS (Page 186)

MEAT CONSUMPTION (Page 189)

CONTENTS

Page

COTTON AND OTHER FIBER

Cotton-Price Quotations on World Markets.....	198
Mill Consumption in Spain Higher Than Last Year But Less Than Earlier Reported.....	199
Japanese Cotton Imports Well Below Last Season.....	199
National Cotton Commission May Be Established in Mexico.....	200

FATS AND OILS

Japan's Fat Balance Shows Marked Improvement.....	202
Sweden's Oilseed Production Down Sharply.....	205
Ceylon's Exports of Coconut Products Increase by One-Fourth...	205

FRUITS, VEGETABLES AND NUTS

World 1952 Filbert Forecast Increased.....	186
Dry Beans Exports at Record Levels.....	192

GRAINS, GRAIN PRODUCTS AND FEEDS

July 1 Grain Stocks Smaller.....	186
Canada's Grain Carry-Over Larger.....	201

LIVESTOCK AND ANIMAL PRODUCTS

Current Trends in World Meat Consumption.....	189
Livestock Slaughter at High Levels in Union of South Africa...	194
Current Meat Trade in Uruguay.....	194
Argentine Cattle Situation--Second Quarter, 1952.....	195
Hog Numbers Increase in Denmark.....	196
Equine Encephalomyelitis Increases in Ecuador.....	197
Anglo-Australian Meat Agreement Prices for Lamb Increased....	197

TOBACCO

Guatemala's Tobacco Production and Imports Higher.....	206
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TROPICAL PRODUCTS

1951-52 World Coffee Production revised Downward--Exports of Coffee During 1951 Calendar Year Higher.....	207
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FOR RELEASE

MONDAY

SEPTEMBER 1, 1952

UNITED STATES DEPARTMENT OF AGRICULTURE
OFFICE OF FOREIGN AGRICULTURAL RELATIONS
WASHINGTON 25, D.C.

L A T E N E W S

A decree recently issued by the Mexican Government may provide more effective control of the cotton pink bollworm in the Matamoros area. The decree empowers the Regional Committee of Agricultural Defense to carry out the cutting and turning under of cotton plants at the expense of any grower who may have failed to do so in response to Government orders.

The Government of India on August 9, 1952 announced that exports of cloth of all categories to all permissible destinations would remain free of controls until the end of December 1952. Export controls which were removed in April and May, 1952 were originally intended to be reimposed (with some exceptions) at the end of August and September for the various categories. However, after a review of the situation it was decided to continue the policy of unrestricted licensing through December 1952 because of the accumulation of large inventories and a further improvement in mill output.

FOREIGN CROPS AND MARKETS

Published weekly to inform producers, processors, distributors and consumers of farm products of current developments abroad in the crop and livestock industries, foreign trends in prices and consumption of farm products, and world agricultural trade. Circulation of this periodical is free to persons in the U.S. needing the information it contains in farming, business and professional operations. Issued by the Office of Foreign Agricultural Relations of the U. S. Department of Agriculture, Washington 25, D. C.

WORLD 1952 FILBERT FORECAST INCREASED 1/

The 1952 preliminary forecast of filbert production in the 4 leading commercial producing countries, Italy, Spain, Turkey and the United States is 117,160 short tons, unshelled basis, compared with 143,520 tons in 1951 and 90,180 tons in 1950. The forecast exceeds the 10-year (1941-50) average of 110,200 tons by 6 percent but is 7 percent below the 5-year (1946-50) average of 125,700 tons.

Growing conditions in Italy were less satisfactory from the start of the season than last year. The dry hot weather of July and August caused a very heavy drop of immature fruit. In Spain the growing conditions, which had been satisfactory up to June, took a turn for the worse in July and August resulting in a heavier-than-expected drop. The forecast of production in both Italy and Spain is down from the July report. In the United States growing conditions remained satisfactory and the forecast is up slightly from last month.

The situation in Turkey has been surprising as far as this year's crop is concerned. Growing conditions were satisfactory but the crop followed a very heavy one and naturally was expected to be small. The Black Sea storms and insect damage were both much below expectations so the present forecast is 42 percent higher than that made a month ago. The Turkish growers are pleased but exporters are a little worried about the situation.

As the 1952-53 marketing year ended it was estimated about 28,400 short tons, unshelled basis, remained in the Mediterranean Basin countries or about 21 percent of the 1951 production. At this time last year it was estimated 11,400 tons, unshelled basis, remained or about 14 percent of the 1950 harvest. Turkey is reported to have about 16,000 short tons from the 1951 harvest, Italy 7,400 tons and Spain 5,000 tons.

The 1951-52 export season abroad came to a close with an estimated 106,300 short tons, unshelled basis, having moved into international trade or 78 percent of the 1951 pack. Turkey, the largest producer, moved an estimated 74,300 short tons of this total or 70 percent of the total. Italy and Spain each exported the equivalent of 16,000 short tons, or 15 percent each.

On the basis of available information, Germany, the United Kingdom, France, Belgium and the Netherlands were as usual the principal buyers of Mediterranean filberts. The total imports by country of destination are not available. The United States imports of shelled filberts from foreign countries from September 1, 1951 through June 30, 1952 totalled 3,364 short tons, which is slightly above the 5-year (1946-50) average. United States imports from Turkey during this period were 2,947 tons or 88 percent of the total imports. There were additional imports during July and August but these figures are not yet available. United States exports during the period under review were about equivalent to those for the previous year, with Cuba, as usual, the principal destination.

The foreign countries are going into the 1952-53 export season with one of the most confused situations in filberts in recent years. Early

FILBERTS, unshelled: Estimated production in specified countries
1952 with comparisons

(Foreign production rounded to nearest 100 short tons)

Year	Italy	Spain	Turkey	Mediterranean Basin Total	United States	World total
	Short tons	Short tons	Short tons	Short tons	Short tons	Short tons
<u>Average:</u>						
1941-50	24,200	21,400	57,600	103,200	7,000	110,200
1946-50	31,900	20,000	65,500	117,400	8,300	125,700
<u>Annual:</u>						
1946	47,800	18,200	90,000	156,000	8,450	164,450
1947	9,900	33,000	60,500	103,400	8,800	112,200
1948	26,400	14,500	55,000	95,900	6,380	102,280
1949	32,700	16,500	99,000	148,200	11,010	159,210
1950	42,900	17,600	23,000	83,500	6,680	90,180
1951 <u>1/</u>	33,000	12,600	91,000	136,600	6,920	143,520
1952 <u>1/</u> <u>2/</u>	19,300	13,800	72,600	105,700	11,460	117,160

1/ Preliminary.

2/ Revised.

Office of Foreign Agricultural Relations. Prepared or estimated on the basis of official statistics of foreign governments, results of office research, trade and other information.

this summer it appeared that the supply of filberts from the 1952 harvest would be somewhat below average although there was a very large carry-over from the 1951 harvest. Prices in all 3 countries at grower level were heading upwards. The Italian and Spanish exporters hoped that the then forecast of a small crop in Turkey would make it possible to sell abroad at the higher price level. In July and August

UNITED STATES: Imports, for consumption, of shelled and unshelled filberts
(Crop year, September-August)

Year	Italy	Spain	Turkey	Other countries	Total
	Short tons	Short tons	Short tons	Short tons	Short tons
<u>SHELLED</u>					
Average:					
1941-42/1950-51	112	197	2,261	37	2,607
1946-47/1950-51	189	44	3,063	37	3,333
Annual:					
1946-47	133	1	4,921	5	5,060
1947-48	39	0	2,398	11	2,448
1948-49	43	0	3,623	30	3,696
1949-50	43	113	3,082	60	3,298
1950-51	689	103	1,292	79	2,163
1951-52 1/	289	95	2,947	33	3,364
<u>UNSHELLED</u>					
Average:					
1941-42/1950-51	203	31	1	0	235
1946-47/1950-51	334	14	0	0	348
Annual:					
1946-47	1,600	69	0	0	1,669
1947-48	3	0	0	0	3
1948-49	44	0	0	0	44
1949-50	24	0	0	0	24
1950-51	0	0	0	0	0
1951-52 1/	92	0	0	0	92

1/ 10 months, September through June.

UNITED STATES: Exports of filberts for consumption 1/
(Crop year, September-August)

Year	Canada	Cuba	Mexico	Other	Total
	Short tons	Short tons	Short tons	Short tons	Short tons
Average:					
1946-47/1950-51	47	187	9	62	305
Annual:					
1946-47	45	158	12	75	290
1947-48	155	145	28	138	466
1948-49	4	162	1	27	194
1949-50	6	188	0	42	236
1950-51	27	280	5	25	337
1951-52 2/	2	325	3	22	352

1/ Unclassified as to shelled and unshelled. Included in "other" nuts before 1943.

2/ 10 months, September through June.

both Italy and Spain discovered they had a smaller crop than expected and this made growers demand even higher prices. The Turkish prices which had reached \$80 to \$83 c.f. per 220 pounds shelled for future shipment suddenly dropped when it was learned that the crop was much larger than expected. This, in turn, was soon learned by Western Europe and other foreign buyers, with the result that business in Italy and Spain is not very active at this time. In Turkey, meanwhile, minimum export prices were promised by the government at \$75 f.o.b.

In addition to the surprise of the very much increased forecast for Turkey, exporters in the other countries are faced with very attractive almond prices and a very large almond crop. Walnuts also are generally expected to produce a large crop in the Mediterranean. The possible restrictive action on the importation of tree-nuts in the United States and austerity programs in the United Kingdom and France are also on the discouraging side for these countries. Germany is looked upon as the best outlet for all 3 countries but in view of the large supply now believed available it seems unlikely that that country can absorb all that will be offered and most likely not at present price levels. Spain has not yet announced its official prices for the new season but they are expected to be at least competitive with Italy, if not Turkey. Altogether the present situation of the filbert industry abroad is not bright. In the United States, growers are facing the marketing of the largest crop on record--By Walter R. Schreiber.

JULY 1 GRAIN STOCKS SMALLER

Grain stocks in the 4 principal exporting countries on July 1, 1952 were somewhat below the high level of the past 3 years though still significantly above average, according to estimates of the Office of Foreign Agricultural Relations. Total stocks of the 5 major grains; wheat, rye, barley, oats, and corn are tentatively estimated at 61 million short tons compared with about 73.5 million for the past 3 years and 53.5 for the 5 years ended 1949.

The decline of 14 million tons from the July 1951 total shows up principally in the United States stocks, though a sharp percentage drop is noted in Argentine stocks and a lesser decrease in Australia. Stocks of all grains in Canada, in contrast, are sharply above those of any recent year, following the large crops harvested last year. The largest percentage reduction in the United States is for wheat stocks, which are down about 36 percent from the 1951 figure. The current United States holdings of corn represent 93 percent of the total for the 4 countries, and are 277 million bushels smaller than July 1951 corn stocks.

Of the 61 million tons of grain estimated on hand July 1, about 41 million, or 68 percent of the total stocks, were in the United States. This is a somewhat smaller percentage of the total than the United States represented during the 2 previous years. At the same time the proportion of the stocks held in Canada has more than doubled. Wheat stocks in Canada were almost double those of July 1950, despite the high level of exports during the current season. Exports from Canada for August through June totalled about 315 million bushels for wheat including flour.

GRAINS: Estimated stocks in the principal exporting countries,
July 1, 1952, with comparisons

Country and year	Wheat	Rye	Barley	Oats 2/	Corn	Total
	Million bushels	Million bushels	Million bushels	Million bushels	Million bushels	Thousand short tons
<u>United States</u>						
1945	279	12	95	234	754	35,842
1946	100	2	59	290	529	23,924
1947	84	2	56	274	710	28,184
1948	196	3	52	182	449	22,696
1949	307	8	101	290	1,267	51,974
Average	193	5	73	254	742	32,524
1950	425	10	80	211	1,381	56,994
1951	396	5	94	292	1,256	54,116
1952 1/	254	4	72	282	979	41,384
<u>Canada</u>						
1945	314	3	44	2/ 140	3/	12,940
1946	104	1	41	2/ 108	3/	5,968
1947	124	1	40	2/ 95	3/	6,323
1948	105	1	42	2/ 71	3/	5,393
1949	135	12	40	2/ 85	3/	6,791
Average	157	4	41	2/ 100	3/	7,483
1950	140	7	30	2/ 70	3/	6,306
1951	235	6	65	2/ 130	3/	10,988
1952 1/	270	10	95	2/ 145	3/	13,125
<u>Argentina</u>						
1945	175	8	31	57	155	11,470
1946	115	8	25	35	125	8,334
1947	125	15	40	25	230	11,970
1948	130	10	20	30	225	11,440
1949	125	16	15	50	200	10,958
Average	134	11	26	40	187	10,834
1950	100	8	12	40	35	5,132
1951	85	15	25	35	90	6,650
1952 1/	35	5	15	25	70	3,910
<u>Australia</u>						
1945	50	3/	3	6	3/	1,668
1946	68	3/	6	15	3/	2,424
1947	58	3/	7	10	3/	2,068
1948	105	3/	10	25	3/	3,790
1949	95	3/	5	10	3/	3,130
Average	75	3/	6	13	3/	2,616
1950	120	3/	7	12	3/	3,960
1951	100	2/	8	10	3/	3,352
1952 1/	80	2/	7	10	3/	2,728
<u>Total</u>						
1945	818	23	173	437	909	61,920
1946	387	11	131	448	654	40,650
1947	391	18	143	404	940	48,545
1948	536	14	124	308	674	43,319
1949	662	36	161	435	1,467	72,853
Average	559	20	146	407	929	53,457
1950	785	25	129	333	1,416	72,392
1951	816	26	192	467	1,346	75,106
1952 1/	639	19	189	462	1,049	61,147

1/ Preliminary estimates. 2/ As reported in bushels of 34 pounds. 3/ Production small and remaining stocks believed negligible.

Office of Foreign Agricultural Relations. Prepared or estimated on the basis of official statistics, reports of United States foreign service officers, or other information.

A distinction should be noted between grain stocks in the 2 Northern Hemisphere countries and those in Argentina and Australia. Stocks in the Southern Hemisphere countries are mid-season supplies and thus include grain for domestic use and for export up to the beginning of their new crop season (December 1 for small grains and April 1 for corn). In the United States July 1 stocks of small grains represent actual carry-over into the new marketing season, and with only 3 months to the end of the corn marketing year. In Canada the new crop year begins on August 1, thus stocks in those two countries approximate the year-end carry-over of small grains in North America.

In the United States the grain stocks of 41.4 million tons were the smallest since 1948. Despite the reduction in stocks, however, total supplies of wheat in this country for the current season will be larger than those of a year ago, because of the larger crop in prospect. If the corn harvest is as large as now forecast the increase over the 1951 harvest will partly offset the reduced stock level, and corn supplies for the coming season would not be greatly under those at the beginning of the 1951-52 season. Disappearance of corn during October-June has been at a near-record rate, reflecting heavy feeding. The increased feeding level is attributed to the low quality of much of the grain in the western portion of the Corn Belt as well as to the large number of livestock being fed. Of the total stocks, 265 million bushels were in the hands of the Commodity Credit Corporation and stored in their bins. Barley, oats and rye supplies will be smaller than last year, because of reductions in both production and stocks.

The total for the 5 grains in Canada on July 1 is tentatively estimated at 13.1 million short tons. This would constitute the largest stocks of any recent year. Added to these stocks, the large grain crops now expected would bring the supply for use in 1952-53 to a near-record level. The wheat supply now indicated at about 870 million bushels, has been exceeded only in 1942 and 1943. A supply that size would leave about 700 million bushels available for export or carry-over, after supplying normal domestic requirements. Oats supplies are expected to be about at the same level as those of a year ago, while the barley supply may reach the all-time high of 370 million bushels. This compares with about 300 million for 1951-52. Rye supplies will also be at a near-record level, if the crop outturn is as large as is expected.

In Argentina no official estimates are made for midseason stocks, but information available points to very low grain supplies remaining from the small crops harvested in 1951-52. Wheat stocks are put at the all-time low figure of 35 million bushels. This is significantly below normal domestic needs for the remainder of the season.

Various measures have been taken to extend existing supplies, including virtual cessation of exports. Despite these measures, supplies are not adequate and the Government has authorized procurement of 220,000 short tons of wheat in the United States for shipment in August-September. These will be the first wheat imports in Argentina's history. The Government is to permit corn exports in the deal for wheat. The exchange is to be at the rate of 1.3 tons of corn for each ton of wheat imported. Corn supplies are also very short, with a maximum of 70 million bushels believed in the Country, contrasted with the 1945-49 average of about 190 million.

In Australia, also, estimates are approximations made for mid-season grain stocks. Though smaller than for the past 4 seasons, stocks appear to be around the average for the 5 years ended 1949. Wheat stocks are estimated at 80 million bushels compared with 100 million in 1951 and the average of 75 million for 1945-49. Other grain crops are relatively small and stocks remaining at mid-season are not particularly significant. --By Judith E. Downey, based in part upon U.S. Foreign Service reports.

CURRENT TRENDS IN WORLD MEAT CONSUMPTION 1/

The total meat supply in specified countries (see accompanying table) in 1951 showed a slight increase over 1950 and was about 4 percent above that of the 1934-38 prewar years. Despite the increase in supplies, the over-all per capita consumption in 1951 was little different from that of 1950 and considerably less than in prewar years in most countries. Increased population in all countries, decreased export surpluses in traditional exporting countries and decreased production in many European countries have been the major factors in holding back the per capita consumption of meat. With population continuing to increase and no immediate prospects of significant increases in meat supplies, little improvement can be expected soon in per capita meat consumption in most countries of the world.

NORTH AMERICA:

In Canada meat production in 1951, although well above that of prewar years, was less than in 1950. Exports were lower but imports were more in 1951 than in either 1950 or prewar. Consequently, per capita consumption is well above the prewar level. In the United States production was below that of 1950 but considerably more than in prewar years. Imports in 1951 were above those of both 1950 and prewar and exports were above the 1950 level but below prewar. Per capita consumption was well above prewar although below that of 1950. In both of these countries cattle herds were being built up and slaughter was relatively low in 1951. In Mexico meat production in 1951 was below that of 1950 and exports were higher and per capita consumption is assumed to be down considerably. In Cuba, with production higher than in 1950 and with imports about the same, per capita consumption increased somewhat.

1/ A more extensive statement will soon be published as a Foreign Agricultural Circular available from the Office of Foreign Agricultural Relations, U.S. Department of Agriculture, Washington 25, D. C.

MEAT 1/: Production, net trade, and consumption, prewar average, 1950 and 1951

Country	Production			Net trade			Exports			Apparent Consumption			In Pounds			Per capita consumption		
	Prewar 2/	1950	1951 2/	Prewar 2/	1950	1951 2/	Prewar 2/	1950	1951 2/	Prewar 2/	1950	1951 2/	Prewar 2/	1950	1951 2/	1950	1951 2/	1951
	Million pounds	Million pounds	Million pounds	Million pounds	Million pounds	Million pounds	Million pounds	Million pounds	Million pounds	Million pounds	Million pounds	Million pounds	Million pounds	Million pounds	Million pounds	Percent	Percent	Percent
Canada.....	1,417	1,916	1,865	-	169	-	1,244	1,775	1,803	113	128	129	113	113	114	113	114	114
Mexico.....	698	1,003	-	4	1	42	689	961	-	38	38	-	38	100	-	100	-	-
United States.....	16,182	22,079	21,909	4	65	283	16,382	21,680	20,912	126	144	138	126	114	114	114	110	110
Cuba.....	309	412	432	4	7	23	316	435	457	77	81	84	77	105	105	105	109	109
Austria.....	617	535	570	4	12	11	629	546	570	92	79	80	92	86	86	86	87	87
Belgium.....	693	713	716	4	48	6	742	719	742	89	83	86	89	93	93	93	97	97
Bulgaria 5/.....	337	-	-	5	-	-	332	-	-	54	-	-	54	-	-	-	-	-
Czechoslovakia.....	1,032	1,124	1,287	4	572	-	1,037	477	455	133	112	106	133	84	84	84	80	80
Denmark 6/.....	1,105	245	248	5	5	-	504	243	249	66	61	62	66	92	92	92	94	94
Finland.....	256	4,288	4,112	4	47	132	4,062	4,156	4,047	97	99	96	97	102	102	102	99	99
France.....	4,015	3,680	4,200	4	150	271	7,621	3,951	4,266	113	79	85	113	70	70	70	75	75
Germany - Western 7/.....	7,471	137	142	4	47	33	255	170	177	36	22	23	36	61	61	61	64	64
Greece.....	208	635	-	18	-	-	617	-	-	69	-	-	69	-	-	-	-	-
Hungary.....	635	315	337	71	71	80	265	235	230	90	79	78	90	88	88	88	87	87
Ireland.....	336	1,335	1,390	4	115	32	1,605	1,367	1,461	38	30	31	38	79	79	79	82	82
Italy.....	1,490	887	1,038	64	56	56	787	831	938	92	83	90	92	90	90	90	98	98
Netherlands.....	851	227	238	2	2	4	229	243	237	79	74	72	79	94	94	94	91	91
Norway.....	227	1,598	338	100	4	2	1,498	347	339	44	42	39	44	98	98	98	91	91
Portugal.....	290	345	338	6	6	-	819	-	-	42	-	-	42	-	-	-	-	-
Romania 5/.....	825	657	691	16	16	50	633	708	720	101	101	103	101	100	100	100	102	102
Sweden.....	649	402	407	17	17	20	436	421	425	105	90	88	105	86	86	86	84	84
Switzerland.....	419	2,545	2,580	4	3,422	2,974	6,272	5,519	4,928	124	112	86	124	90	90	90	69	69
United Kingdom.....	2,852	888	-	19	-	-	869	-	-	57	-	-	57	-	-	-	-	-
Yugoslavia.....	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Soviet Union 5/.....	7,140	-	-	3	-	-	7,143	-	-	43	-	-	43	-	-	-	-	-
Argentina.....	4,330	5,080	4,650	-	1,460	-	2,870	3,965	3,985	215	231	225	215	107	107	107	105	105
Brazil 8/.....	2,214	2,864	2,870	-	211	-	2,003	2,798	2,830	53	53	53	53	100	100	100	100	100
Chile.....	349	391	394	-	21	-	328	388	393	73	66	66	73	90	90	90	90	90
Paraguay 9/.....	167	193	-	16	-	30	151	163	-	162	116	-	162	72	72	72	-	-
Uruguay.....	785	842	785	-	324	-	461	548	563	225	231	235	225	103	103	103	104	104
Union of South Africa.....	671	937	868	4	6	-	677	924	873	70	75	69	70	107	107	107	99	99
Australia.....	2,202	2,249	2,212	-	521	-	1,680	1,783	1,846	245	218	219	245	89	89	89	89	89
New Zealand 10/.....	1,024	1,246	1,139	-	600	-	424	418	441	212	220	228	212	104	104	104	108	108

Office of Foreign Agricultural Relations. Prepared or estimated from official statistics of foreign governments, United States Foreign Service reports, and other information. Data relate to present boundaries unless otherwise noted.

EUROPE:

In Austria, per capita consumption in 1951 was about the same as in 1950 but below that of prewar as was production. In Belgium consumption was above that of 1950 and nearly equal to that of prewar with both production and imports being greater than in 1950 and the prewar years. In Denmark, although production in 1951 was above that of both 1950 and prewar, consumption was less because of greatly increased exports. In Finland, both production and consumption were above that of 1950 but still below that of prewar. In France, production and consumption was nearly the same in 1951 as in 1950 and prewar years. In Western Germany production and consumption were above that of 1950 but still well below that of prewar years. In Greece production and consumption were above that of 1950 but only about two-thirds of prewar levels. In Ireland in 1951 production was above that of 1950 and equal to that of prewar but consumption was less, due to increased exports.

In Italy production and consumption were up slightly from 1950 but still less than in prewar years. In the Netherlands, despite increased exports, production was up enough to allow consumption well above that of 1950 and almost at the prewar level. In Norway production, although greater than prewar, was less than in 1950 and per capita consumption remained below the prewar level. In Portugal although production in 1951 was more than that of prewar years, per capita consumption was less than in 1950 and prewar. Sweden, which is now on an import basis for meat, has increased both production and per capita consumption over 1950 and the prewar years. In Switzerland which continues on an import basis both production and consumption are below prewar levels. In the United Kingdom production in 1951 was slightly above that of 1950 but still below that of prewar. With imports down 20 percent from 1950 and down nearly one-third from prewar, per capita consumption is much below 1950 and prewar years.

SOUTH AMERICA:

In Argentina meat production in 1951, although higher than prewar, was less than in 1950. Per capita consumption, less in 1951 than in 1950, was maintained at a very high level by a continuing reduction in the export surplus. In Brazil per capita consumption remained the same as in 1950 and prewar although production was considerably higher than in prewar years. In Chile, although production was above that of 1950 and prewar, per capita consumption was below the prewar level. In Uruguay production was below that of 1950 and the same as in prewar years but with exports severely reduced, per capita consumption has been steadily increased from the very high prewar level.

OCEANIA:

In Australia meat production has remained at about the same level as in 1950 and prewar years but, despite sharply reduced exports, per capita consumption in 1951 as in 1950, although very high, is well below that of prewar years. In New Zealand, per capita consumption has been maintained at very high levels by increased production over the prewar level and by a decrease in exports in 1951 as compared to 1950.

--Prepared by Louis M. Smith, based in part on Foreign Service Reports

DRY BEAN EXPORTS AT RECORD LEVELS

United States exports of dry beans reached a new record of 3,666,000 bags in the year ending last June 30. This was 60 percent larger than the 2,285,000 bags exported in the previous fiscal year and 8 percent larger than the previous record of 3,380,000 bags exported in the calendar year 1943.

Three principle factors contributing to these record exports were drought in Mexico and Cuba in 1951, reduced export prices in the United States for old-crop beans held in storage by the Commodity Credit Corporation and the Korean war.

The largest taker of United States beans was Mexico which imported a total of 1,173,000 bags during the fiscal year 1951-52. This is far in excess of all previous shipments to Mexico in the last 20 years. Shipments the previous season totaled only 758 bags and the previous record shipment was only 16,000 in the calendar year 1939. Shipments in all years except 1939 and 1951-52 have been in only small quantities of 1,000 to 2,000 bags.

Cuba was the second largest importer during 1951-52 with 1,118,000 bags compared to 698,000 bags in the previous year. This exceeds all past records to Cuba by considerable margin. Exports to Cuba have been increasing rapidly during the past 2 decades. In 1935, 21,000 bags were sent, 220,000 bags in 1939, 526,000 bags in 1949 and 679,000 in 1950. The Cuban market was unusually favorable to United States exports in 1951 by reason of the short production of food crops in Chile and resulting export controls. Chile is a customary source of supply for part of Cuba's imports of beans.

The third largest taker was the United Kingdom with 417,000 bags in the season under review. This was the largest shipment to the United Kingdom since 1944 when 706,000 bags were sent. The all-time record was in 1941 when 1,828,000 bags were shipped. The movement last season totaled only 151,000 bags.

Other important destinations of United States exports of beans in 1951-52 in the order of quantity taken were Korea, the Netherlands, Greece, Belgium, Palestine, Canada and Venezuela. Exports to the Netherlands, Belgium and Venezuela set new records for those countries and exports to Palestine and Canada were of record proportions. Those to Korea were the first recorded. United States exports to Palestine have been only in small quantities through 1949 but in the last 2 fiscal years this movement has increased sharply to 138,000 bags in 1950-51 and 65,000 bags in 1951-52. Exports to the Netherlands have been less than 1,000 bags per year previous to 1951-52 except in the calendar year 1940 when 33,000 bags were sent.

United States exports during the year went to upwards of 60 countries scattered in all parts of the world, but 99 percent of the total went to the 12 countries listed in the table.--By Orval E. Goodsell, based in part upon U.S. Foreign Service reports.

BEANS, dry edible: United States exports by country of destination
1950-51 and 1951-52

(July/June basis)

Country of destination	1950-51	1951-52
	<u>1,000 bags</u>	<u>1,000 bags</u>
Belgium and Luxembourg	49	84
Canada	119	55
Colombia	200	1
Cuba	698	1,118
Greece	96	192
Italy	13	8
Korea	-	253
Mexico	1	1,173
Netherlands	1	215
Palestine and Israel	138	65
United Kingdom	151	417
Venezuela	34	50
Yugoslavia	750	<u>1/</u>
Others	<u>35</u>	<u>35</u>
Total	2,285	3,666

1/ Less than 500 bags.

Office of Foreign Agricultural Relations, United States Department of Agriculture. Prepared or estimated on the basis of official statistics of foreign governments, reports of U. S. Foreign Service officers, results of office research and other information.

COMMODITY DEVELOPMENTS

LIVESTOCK AND ANIMAL PRODUCTS

LIVESTOCK SLAUGHTER AT HIGH LEVELS IN UNION OF SOUTH AFRICA

In the Union of South Africa during the first 6 months of 1952 larger supplies of slaughter stock have been shipped to markets than during the same period in 1951, according to C. H. Marks of the American Embassy in Pretoria. Cattle in record numbers were slaughtered and cold storage facilities were filled to capacity as the maximum number were accommodated in abattoirs.

The serious 1951 drought that progressed into the early months of 1952 was primarily responsible for these large offerings of cattle. The summer drought was broken temporarily in late February only to be continued from that point on into the winter season as producers offered cattle in record numbers for slaughter. Cattle and sheep are still being sent to market in large quantities. Most of this slaughter stock is going into the fresh meat trade inasmuch as cold storage facilities have long since been filled.

Foreign trade consists primarily of imports of cattle from the contiguous African territories and a larger number were imported in the first six months of 1952 than in the previous year. No fresh beef is exported except for small amounts for ships' stores.

Trade circles are still anticipating a serious meat shortage during 1952 but the time has moved up from mid-year until probably September or October. When the first general rains begin in these spring months, producers are expected to stop the flow of cattle to the markets.

CURRENT MEAT TRADE IN URUGUAY

During July, an 8,000-head cattle quota allotted by the Uruguayan Government to jerked beef producers for the last half of 1952. The same quantity had been decreed for the first 6 months of the year, thus bringing the total jerked beef slaughter quota to 16,000 head for 1952. The decree provides for continuation of the export exchange rate of 1.519 pesos to one dollar. So far this year Cuba has taken most of the jerked beef exports.

HOG NUMBERS INCREASE IN DENMARK

According to the census of July 12, 1952, hog numbers are higher than at the same period in 1951 and than in 1939 (see accompanying table). As compared to one year earlier, total hog numbers are up in all major categories.

DENMARK: Total hog numbers on July 12, 1952,
with comparisons

Classification	: July 12, : : 1952	: Dec. 29, : : 1951	: July 14, : : 1951	: July 15, : : 1939
	: 1,000	: 1,000	: 1,000	: 1,000
	: <u>head</u>	: <u>head</u>	: <u>head</u>	: <u>head</u>
Boars	: 13	: 12	: 12	: 18
Sows	:	:	:	:
To farrow first time	: 135	: 70	: 81	: 76
Others to fallow	: 149	: 133	: 130	: 173
Total sows to farrow	: 284	: 203	: 211	: 249
With litter	: 118	: 96	: 94	: 102
Dry (not with litter and not for slaughter)	: 28	: 27	: 26	: 28
For slaughter	: 9	: 9	: 9	: 11
Total sows	: 439	: 335	: 340	: 390
Suckling pigs	: 1,022	: 815	: 799	: 856
Pigs and slaughter hogs	:	:	:	:
Under 35 kilos	: 759	: 694	: 702	: 789
35-60 kilos	: 758	: 748	: 757	: 651
60 kilos and over	: 641	: 625	: 590	: 479
Total pigs & slaughter hogs	: 2,158	: 2,067	: 2,049	: 1,919
Total hog numbers	: 3,632	: 3,229	: 3,200	: 3,183

Source: Statistiske Efterretninger (Statistical Reports).

The 5 percent increase in young pigs and slaughter hogs during the past year will be reflected in a corresponding increase in pork supplies within the next few months and the 28 percent increase in suckling pigs will result in a marked increase in pork supplies during late 1952 and early 1953. The 29 percent increase in total sow numbers and the 35 percent increase in bred sows will result in increased pig numbers this fall and, consequently, in larger pork supplies during the first half of 1953. This expected increase in pork supplies will enable Denmark to increase its domestic consumption of meat which in 1951 was below that of 1950 and to further increase its meat exports.

Frozen beef and mutton stocks awaiting export are estimated at 63.9 million pounds (beef) and 12.2 million pounds (mutton), according to trade sources. For the near future Brazil looms as the most important single market for beef as provided for by the Uruguayan-Brazilian barter agreement negotiated in March of this year. So far 5.7 million pounds of frozen beef have been shipped to Rio de Janeiro under this arrangement; an additional 5.1 million pounds are to be loaded soon.

Yesterday Greece opened bids in this market for delivery of 2.2 million pounds of frozen beef and mutton with payment to be made in dollars. It is expected that Greece will continue purchases during the remainder of this year, although it is not known whether preference will be given for mutton or beef. In July the Greek Government purchased for its own account (after the expiration and fulfillment of U.S. Quartermaster contracts) 2.2 million pounds of beef.

Meat shipments to the United Kingdom are expected to come to a temporary standstill after the 7.7 million pounds provisional agreement is fulfilled. The Uruguayan Government has indicated unwillingness to authorize additional shipments until agreement is reached on the Anglo-Uruguayan meat contract which is contingent on the outcome of Anglo-Argentine negotiations under way in Buenos Aires.

ARGENTINE CATTLE SITUATION--
SECOND QUARTER, 1952 1/

Marketing of cattle increased seasonally from April through June to bring the half-year total closely in line with that of 1951, according to C. C. Wilson of the American Embassy in Buenos Aires. Slight increases were granted in official cattle prices. Beef prices to consumers were increased sharply to cover wage increases at packing plants.

Meat exports currently are small, pending a new agreement for shipment to the United Kingdom. Deliveries under the previous contract were completed in the second quarter. Stocks now are accumulating despite seasonally reduced marketings and a moderate increase in the quota for domestic consumption. Prices for cattle, nevertheless, remain firm on the basis of a domestic demand larger than the present quota, plus the general belief that a satisfactory deal will be worked out with the British.

1/ A more extensive statement will soon be published as a Foreign Agricultural Circular available from the Office of Foreign Agricultural Relations, U. S. Department of Agriculture, Washington 25, D. C.

EQUINE ENCEPHALOMYELITIS INCREASES IN ECUADOR

Officials of the Ecuadoran Veterinary Service report an increasing incidence of equine encephalomyelitis along the coast of Ecuador and particularly in Manabi, Esmeraldas and Los Rios Provinces according to J. L. Martinez of the American Consulate General at Guayaquil.

This disease has been known to exist in Ecuador for many years but never before as widespread as at present. The same virus that causes encephalomyelitis in horses can also cause sleeping sickness (encephalitis) in human beings. Both maladies are in a group of serious diseases of the central nervous system that includes poliomyelitis (infantile paralysis) of human beings. In the United States, two types of the virus, the so-called eastern and western types, have been reported.

The disease in Ecuador is reported to be caused by a virus known locally as "Venezuelan type" (encephalitis Venezuela) which is transmitted by mosquitoes (*Culex quinquefasciatus*, *Aedes serratus* and *taeniorhynchus*, and *Mansonia titillans*).

Veterinarians in Guayaquil state that serum for inoculations is not locally produced in sufficient quantities and that imported vaccines, aside from being very expensive, are ineffective because the serum is not of the Venezuelan type.

ANGLO-AUSTRALIAN MEAT AGREEMENT PRICES FOR LAMB INCREASED

Following discussions between representatives of the Australian Government and Meat Board and the United Kingdom Ministry of Food, it has been agreed that the prices to be paid for Australian mutton and lamb in the 1952/53 season shall be increased by 16.6 percent over those of the previous season.

This year's discussions which began in June were the first to take place under the 15 year Meat Agreement signed by the two Governments in October, 1951, under which changes in the Australian costs of production are taken into account.

The rise in price to Australia will probably be followed by an increase in price paid to New Zealand.

COTTON AND OTHER FIBERCOTTON-PRICE QUOTATIONS
ON WORLD MARKETS

The following table shows certain cotton-price quotations on world markets converted at current rates of exchange.

COTTON: Spot prices in certain foreign markets, U.S. gulf-port average, and taxes incident to exports

Market location, kind, and quality	Date 1952	Unit of weight	Unit of currency	Price in foreign currency	Equiv. US¢ a lb.	
					Spot quo- tation	Export & inter- mediate taxes
<u>Alexandria</u>		:Kantar				
Ashmouni, FG.....	8-28	: 99.05 lbs.	:Tallari	: 81.00	: 46.66	: -----
Ashmouni, Good.....	"	: "	: "	: 72.00	: 41.47	: -----
Ashmouni, FGF.....	"	: "	: "	(not quoted)		: "
Karnak, FG.....	"	: "	: "	: "	: "	: "
Karnak, Good.....	"	: "	: "	: "	: "	: "
Karnak, FGF.....	"	: "	: "	: "	: "	: "
<u>Bombay</u>		:Candy				
Jarila, Fine.....	"	: 784 lbs.	:Rupee	1/ 725.00	: 19.30	: 10.65
Broach Vijay, Fine....	"	: "	: "	2/ 840.00	: 22.36	: 10.65
<u>Karachi</u>		:Maund				
4F Punjab, SG, Fine....	8-27	: 82.28 lbs.	: "	3/ 88.00	: 32.27	: 13.85
289F Sind, SG, Fine....	"	: "	: "	3/ 93.00	: 34.10	: 13.85
289F Punjab, SG, Fine....	"	: "	: "	3/ 96.00	: 35.20	: 13.85
<u>Izmir</u>		:Kilogram				
Acala I.....	8-28	: 2.2046 lbs.	:Kurus	: 280.00	: 45.36	: -----
Acala II.....	"	: "	: "	: 257.00	: 41.63	: -----
<u>Adana</u>		: "	: "			
Acala I.....	"	: "	: "	: 235.00	: 38.07	: -----
<u>Lima</u>		:Sp. quintal				
Tanguis, Type 3-1/2....	8-26	: 101.4 lbs.	:Sol	: 519.00	: 33.63	: 9.35
Tanguis, Type 5.....	"	: "	: "	: 495.00	: 32.07	: 7.76
Pima, Type 1.....	"	: "	: "	: 675.00	: 43.73	: 6.57
<u>Recife</u>		:Arroba				
Mata, Type 4.....	8-28	: 33.07 lbs.	:Cruzeiro	: 305.00	: 50.18	: 2.4% ad
Sertao, Type 4.....	"	: "	: "	4/ 370.00	: 60.87	: valorem
<u>Sao Paulo</u>		: "	: "			
Sao Paulo, Type 5.....	"	: "	: "	: 300.00	: 49.36	: 3.0% ad
<u>Torreón</u>		:Sp. quintal				: valorem
Middling, 15/16".....	"	: 101.4 lbs.	:Peso	: 263.00	: 30.15	: 5.53
<u>Houston-Galveston-New</u>						
Orleans av.Mid. 15/16":	"	:Pound	:Cent	: XXXXX	: 38.63	: -----

Quotations of foreign markets and taxes reported by cable from U.S. Foreign Service posts abroad. U.S. quotations from designated spot markets.

- 1/ Reported 725.00 to 750.00 (19.96). Ceiling 820.00 (21.83).
- 2/ Reported 840.00 to 850.00 (22.63). Ceiling 925.00 (24.62).
- 3/ Nominal floor prices not currently applicable to export trade.
- 4/ Nominal.

MILL CONSUMPTION IN SPAIN HIGHER THAN LAST YEAR BUT LESS THAN REPORTED EARLIER

Consumption of cotton in Spanish mills during the August 1951-June 1952 period totals about 275,000 bales (of 500 pounds gross) a substantial increase over last year, it now appears. Earlier reports had indicated a higher rate. Consumption during the entire 1950-51 season amounted to 248,000 bales.

For the first time in years the Spanish cotton textile industry, centered in the Barcelona area, is reported to possess an adequate supply of raw cotton. Quantities available to manufacturers are reported to be sufficient for 2-1/2 to 3 months' mill consumption at current levels of operation. Also, additional quantities sufficient for about 2 months' requirements have already been ordered from overseas sources. According to the latest official figures almost 2,100,000 spinning spindles are now in use in Spain. In 1935 about 1,850,000 were in use.

Wholesale prices of cotton textile goods were reduced during the summer to some 10-15 percent below spring prices. Many manufacturers and wholesalers were reported to be making downward price readjustments on their goods, taking into account the stocks of higher priced goods in retail outlets and the lower quotations of newly-manufactured items. These circumstances permitted moderate reductions by retail establishments on all goods in their shops.

Imports of cotton into Spain during August 1951 through June 1952, the first 11 months of the 1951-52 season, amounted to 265,000 bales (500 pounds gross). Of this total 179,000 bales were from the United States, 41,000 bales from Egypt, 14,000 bales from India-Pakistan, and 12,000 from Brazil. During the comparable period a year earlier a total of 216,000 bales were imported into Spain; this total included 99,000 bales from the United States, 31,000 bales from Egypt, 26,000 bales from India-Pakistan, and 15,000 bales from Brazil.

JAPANESE COTTON IMPORTS WELL BELOW LAST SEASON

A total of 1,505,000 bales (500 pounds gross) were imported into Japan during the August 1951-June 1952 period. This compares with 1,873,000 bales during the first 11 months of the 1950-51 season. Imports through June of the past season (1951-52) amounted to 1,002,000 bales from the United States, 230,000 bales from Pakistan, and 127,000 from Mexico. Imports from these 3 countries during the comparable months in 1950-51 amounted to 979,000 bales, 376,000 bales, and 229,000 bales, respectively.

Preliminary estimates of the June 1952 consumption of cotton in Japanese spinning mills amounted to 146,000 bales. This represented an increase of about 13,000 bales over the amount consumed in the preceding month but was somewhat below the postwar monthly peak of 169,000 bales in January 1952. During the first 11 months of the 1951-52 season consumption totaled 1,659,000 bales or 229,000 bales more than consumption during the same months of the preceding season.

The monthly output of cotton yarn during the 1951-52 season reached a peak of 71.1 million pounds in January 1952. After that time the outturn steadily declined until June, except that April showed a slight increase over March. The reduction since March 1 may be primarily attributed to the recommendation of the Japanese Government to limit yarn production to about 60 million pounds per month because of large inventories. All monthly totals from March through June 1952 were below this figure. The Government subsequently modified its recommendations regarding mill curtailment and suggested a maximum limit of 62.8 million pounds for July and 66 million for August. Even though some increase after June is suggested by the Government, the need still exists for limiting production in order that the supply may be held somewhat in line with the expected demand.

The modified Government recommendation, together with the anticipated increased demand for textile products, will probably result in some increase in the output of yarn products in Japan during future months. However, there still exists some apprehension over the possibility of the accumulation of excessive stocks because of the restrictions on textile imports by some of the principal countries importing Japanese cotton goods.

The extent to which yarn production in Japan is being curtailed is reflected by the number of idle spindles. At the end of June 1952 there were 6,791,000 operable cotton spindles in the Japanese industry of which 5,267,000 or 78 percent were actually operated during the month. For comparison, on June 30, 1951, a total of 4,716,000 or 95 percent of the 4,977,000 operable spindles were in operation.

The Japanese Government is continuing to encourage the import of sterling cottons because of the extraordinary accumulation of sterling. Consideration is now being given by the Government to increasing the scope of sterling loans for imports and making them more attractive by reducing the interest rate and extending the terms (the current interest rate for cotton is 5 percent and the terms are up to one year). Up to August 5, 1952, 1,277 sterling loans had been made for the purchase of cotton for a total of £13.2 million, equivalent at official rates to about \$36.9 million.

NATIONAL COTTON COMMISSION MAY BE ESTABLISHED IN MEXICO

The establishment of a National Cotton Commission in Mexico is reported to be under consideration by the Government. Several Government departments are currently studying plans to establish such an agency which would be entrusted with directing the expansion of Mexico's cotton production and marketing on a sound economic basis. The agency, according to present plans, would be supported by cotton farmers' organizations and would involve cooperation of the Departments of Agriculture, National Economy, and the Treasury. The agency would be similar to those which have been directing expansion plans for corn, coffee, olives, and sugarcane.

According to plans now being considered the Commission would conduct a survey of cotton plantings in order to establish any further expansion in cotton production on a sound technical basis. The Commission would also be entrusted with establishing experiment stations to conduct research directed toward improving the quality of the Mexican fiber. These stations would likewise investigate means of reducing the costs of production and marketing. One of the important aspects of the proposed Commission's work would be a detailed survey of the world cotton market for the purpose of helping Mexican farmers obtain new outlets for excess fiber.

The formation of a National Cotton Commission has been mentioned in cotton circles for some time and was officially proposed several months ago at a meeting of the Cotton Farmers' Association in Culiacan, Sinaloa. However, there has been some opposition to the creation of such an agency by the Mexican textile industry and others. The textile industry is not being included as a possible participant in the proposed Commission.

GRAINS, GRAIN PRODUCTS AND FEEDS

CANADA'S GRAIN CARRY-OVER LARGER

Total carry-over stocks of Canadian grain in all North American positions as of July 31, 1952 were somewhat larger than on that date of 1951 and also above the average for the 10 years ended 1950. Increases over the 1951 figures are noted for all grains. The increase over the 1941-50 average, however, is due to the higher level of coarse grain stocks, which more than offsets a reduction from the high wheat stocks of that period. The official estimates recently released by the Dominion Bureau of Statistics reflect the heavy marketings of wheat during the past season, reducing carry-over stocks below the 1941-50 level despite a substantially larger supply at the beginning of the 1951 season.

The wheat estimate of 213 million bushels compares with the average of 257 million for the 1941-50 period and is only 36 percent of the record 595 million carried over on July 31, 1943. Of the total for this year, all but 19.3 million bushels on farms were in commercial positions. On a tonnage basis, wheat accounts for about 60 percent of current carry-over stocks of the four grains. Rye carry-over of 7.7 million bushels was more than double the 1951 carry-over and was almost 50 percent above the 10 year average.

Current estimates of 105 million bushels of oats in all positions are the largest since 1944. Barley stocks are estimated at a record 77 million bushels. This compares with a previous record of 69 million bushels in 1943. Farm stocks of oats were slightly below those of a year ago but barley and rye stocks on farms were slightly above those of last year.

Canada: Carry-over stocks of grain in all positions,
July 31, 1951 with comparisons

Position	Wheat	Oats 1/	Barley	Rye
	: 1,000	: 1,000	: 1,000	: 1,000
	: bushels	: bushels	: bushels	: bushels
	:	:	:	:
On farms.....	: 19,262	: 57,836	: 21,476	: 1,346
Country elevators.....	: 94,947	: 21,943	: 24,355	: 1,839
Interior private and mill elevators.:	: 4,652	: 680	: 1,916	: 15
Interior terminal elevator.....	: 5,454	: 26	: 96	: 2/
Pacific Coast terminals.....	: 6,614	: 770	: 1,934	: 1
Churchill elevator.....	: 2,251	: 2/	: -	: -
Fort William-Port Arthur elevators..:	: 13,700	: 7,133	: 8,442	: 2,923
In transit, lakes.....	: 4,520	: 2,266	: 2,618	: -
In transit, rail.....	: 19,812	: 7,241	: 6,033	: 347
Eastern elevators.....	: 37,594	: 3,121	: 9,654	: 627
Eastern mills.....	: 1,538	: 319	: 159	: 1
Western mills.....	: 287	: 65	: 38	: 2/
Total in Canada.....	: 210,731	: 101,400	: 76,721	: 7,099
Canadian grain in the United States	: 2,244	: 3,497	: 217	: 577
Total Canadian grain in Canada and	:	:	:	:
the United States.....	: 212,975	: 104,897	: 76,938	: 7,676
	:	:	:	:
Total Canadian grain.....	:	:	:	:
July 31, 1951	: 189,203	: 95,177	: 53,496	: 3,299
July 31, 1941-50 average.....	: 256,517	: 72,652	: 30,610	: 5,193
1/ In bushels of 34 pounds.	2/ Less than 500 bushels.			

From reports of the Dominion Bureau of Statistics.

FATS AND OILS

JAPAN'S FAT BALANCE SHOWS MARKED IMPROVEMENT

Japan's annual requirements of fats, oils, and oilseeds, on an oil equivalent basis, ranges roughly between 275,000 and 330,000 short tons, according to information available to the Office of Foreign Agricultural Relations. In 1951, domestic production from indigenous sources, mainly soybeans, rapeseed, rice bran, and fish and whale oils (including Antarctic production) totaled 213,500 tons oil equivalent, an increase of 28 percent from 1950, but still substantially below prewar.

Domestic production of soybeans, which normally averages about 400,000 tons annually, are mainly for food use, whereas imported soybeans are principally for crushing purposes. Rapeseed output increased markedly with the relaxation of compulsory planting of barley in 1950. The 1952 rapeseed crop now is estimated at 311,000 tons, exceeding the 1951 record output by a broad margin. With the discontinuance of Government control over rice bran, the rice bran oil industry is having difficulty in procuring bran for crushing. The quality of rice bran oil, however, is expected to improve as, through free transaction, extractors are able to procure a fresher raw material.

Fish oil production in Japan has declined sharply from prewar years because of the decrease in the catch of sardines and herring from adjacent seas. The role which the Japanese fish oil played in prewar years as a primary material for soap has now been replaced largely by tallow imported from the United States. In order to make up for the scarcity of food-stuff in Japan, whale oil expeditions to the Antarctic were resumed right after the war's end. Production increased yearly as the fleets became better equipped. The final figures from the 1951-52 season are 38,650 tons of whale oil and 9,790 tons of sperm oil. Production from adjacent seas consists mainly of sperm oil.

JAPAN: Domestic production of principal oils and oilseeds,
average prewar, annual 1948-1951 1/

(Short tons)

Commodity	: Prewar <u>2/</u> : average	: 1948	: 1949	: 1950	: 1951
Soybeans.....	<u>3/</u> 370,140	235,892	238,097	356,043	485,012
(oil equivalent).....	55,523	35,384	35,715	53,406	72,752
Rapeseed.....	<u>3/</u> 134,922	29,762	41,887	131,174	197,312
(oil equivalent).....	47,223	10,417	14,661	45,911	69,059
Rice bran oil.....	<u>4/</u> 11,610	5,300	12,816	12,822	15,669
Fish oils.....	<u>5/</u> 87,524	7,229	12,941	18,251	18,056
Whale oil <u>6/</u>	<u>7/</u> 95,025	19,906	23,078	30,503	29,098
Sperm oil <u>6/</u>	<u>7/</u> 10,788	1,060	2,013	6,384	8,884
Total (oil equivalent)....	311,334	79,296	101,224	167,277	213,518

1/ Figures may differ slightly from data previously published. 2/ Prewar average as indicated. 3/ Average 1935-39. 4/ Average 1937-39. 5/ Average 1934-36. 6/ Includes Antarctic production. 7/ Average 1938-41.

Food Agency and Fisheries Agency, Ministry of Agriculture and Forestry, Japan.

Imports of fats, oils, and oilseeds into Japan, which in some years accounted for as much as 60 percent of Japan's total consumption, aggregated about 130,000 tons oil equivalent in 1951. The bulk of Japan's fats and oils importation is in the form of raw materials. Imports of oilseeds in 1951 totaled 517,887 tons, substantially above 1950 but less than half of prewar. Vegetable oil receipts decreased sharply, amounting to only 6,445 tons in 1951, against 16,090 tons the previous year. Tallow and lard imports, almost all from the United States, were 32,185 and 2,616 tons, respectively, as compared with 13,940 and 2,500 tons in 1950.

Almost two-thirds of the entire volume of oilseeds imported in 1951 consisted of soybeans, of which 313,510 tons, or 94 percent came from the United States. In contrast, 52 percent of the total soybean import in 1950 came from China with the balance coming from the United States.

Principal countries of origin for other major oilseed imports in 1951 were as follows: copra-Philippines (30,807 tons), Guam (15,016); cottonseed-Pakistan (11,612), Iraq (7,615), Thailand (2,497), Mozambique (2,237); peanuts-China (8,645), Indonesia (2,540), India (2,427); flaxseed-Canada (26,093), India (23,943), United States (4,129); castor beans-India (10,945), Thailand (4,245); kapok seed-Indonesia (8,057), India-(1,608); sesame seed-China (3,047), India (1,419), Iraq-(1,208); mustard seed-China (1,714); and rapeseed-India (388 tons).

JAPAN: Imports of vegetable oilseeds,
average 1936-38, annual 1948-51

(Short tons) .

Oilseed	Average 1936-38	1948	1949	1950	1951 1/
Soybeans.....	835,568	54,518	209,644	217,625	332,869
Copra.....	27,412	24,377	17,083	83,340	46,688
Cottonseed.....	101,136	-	588	12,150	27,050
Peanuts (unshelled).....	24,905	20,548	15,267	26,056	15,882
Flaxseed.....	10,631	6,992	16,475	30,230	57,182
Rapeseed.....	9,328	-	2,029	890	388
Sesame seed.....	21,511	338	245	2,406	9,049
Castor beans.....	36,240	2,526	4,883	14,656	15,386
Kapok seed.....	-	-	44	3,067	11,031
Mustard seed.....	1,766	-	-	2,187	2,057
Others.....	109,506	44,595	27,445	331	305
Total.....	1,178,003	153,894	293,703	392,938	517,887

1/ Data for 1951 from Customs Clearance, International Trade Bureau, Ministry of International Trade and Industry.

Ministry of Agriculture and Forestry, Japan.

Although a net importer of fats and oils, Japan, following a policy of importing raw materials for domestic processing, exported substantial quantities of fats and oils in prewar years, averaging some 50,000 tons per year. Exports fell sharply during the war, however, and due to the critical domestic scarcity of fats and oils in postwar years, remained relatively unimportant. An exception to this rule is in the export of vitamin oils, most of which goes to the United States. In the past few years, this commodity has become a cardinal export item as in prewar years. In 1951, 6,791 tons of vitamin oils were licensed for export.

With the increased availabilities of raw materials in 1950 and 1951 and the relaxation of Government control measures in June of 1951, limited quantities of vegetable oils were allowed to find foreign outlets. Although Japan is still far from becoming self-sufficient in fats and oils, it is generally expected that from 1952 on, increased exports of fats and oils will be permitted in accordance with certain export schedules worked out by the Government.

SWEDEN'S OILSEED PRODUCTION DOWN SHARPLY

Sweden's 1952 oilseed production is down sharply from 1951, according to August 1 indications as reported by the American Embassy, Stockholm. Total oilseed production, now placed at 192,680 short tons, is 30 percent less than the 1951 outturn of 275,575 tons. Moreover, this decrease is considerably greater than anticipated early in the season (see Foreign Crops and Markets, May 12, 1952). The decline is attributed to acreage reduction--from 469,740 to 364,720 acres--and below normal yields.

Preliminary estimates of oilseed crops have been reported as follows, with 1951 comparisons:

Oilseed	Area		Production	
	1951	1952 1/	1951	1952 2/
	1,000 acres		1,000 short tons	
Rapeseed	377.8	267.8	232.6	151.0
White mustard	33.8	46.2	15.4	18.5
Flaxseed	58.1	50.7	3/ 27.6	4/ 23.2
Total	469.7	364.7	275.6	192.7

1/ Preliminary. 2/ Indicated August 1. 3/ 984,200 bushels.
4/ 826,720 bushels.

CEYLON'S EXPORTS OF COCONUT PRODUCTS INCREASE BY ONE-FOURTH

Exports of copra, coconut oil, desiccated coconut, and fresh coconuts from Ceylon during January-June 1952 on a copra equivalent basis totaled 141,700 long tons or an increase of roughly one-fourth from exports during the first half of 1951. Shipments amounted to 22,490 long tons of copra, 54,172 tons of coconut oil, 25,427 tons of desiccated coconut, and 3.2 million fresh coconuts, according to information reported by Myron L. Black, American Embassy, Colombo.

Copra exports jumped from 8,422 tons during the first quarter to 14,068 tons the second quarter. Pakistan continued to be the principal buyer accounting for 15,104 tons or two-thirds of the six-month total and India ranked second taking 5,566 tons or one-fourth. Both countries increased their purchases substantially the second quarter over the first.

Coconut oil exports rose from 24,094 tons in January-March to 30,077 the past quarter. The principal market for the half-year period was Italy with purchases of 14,534 tons, followed by the United Kingdom with 10,586 and the Netherlands with 8,645 tons. Second-quarter purchases by all the above-mentioned countries increased from the first quarter.

Desiccated coconut exports dropped from 14,012 tons the first quarter to 11,415 tons the second quarter. The United Kingdom purchased 15,550 tons or 60 percent of the 6-month total. Exports of fresh coconuts increased from 1.2 million nuts to 2.0 million during the first 2 quarters of 1952. Over 2.3 million nuts, representing 70 percent of the total, were taken by the United Kingdom.

Prices of copra and coconut oil rose appreciably during June compared with March. The increase is attributed by the trade to improved demand for oil from the United Kingdom and other sources. The price of estate No. 1 copra closed at 135.00 rupees per candy of 560 pounds (\$113 per long ton) at the end of June compared with 120.00 rupees (\$101) on April 1, although the high of the quarter was 150.00 rupees (\$126), the quotation for May 19 and June 12. Coconut oil on June 18 was reported at 875.00 rupees per long ton (\$183) compared with 750.00 rupees (\$157) on April 1 and a high for the period of 900.00 rupees (\$189) on June 11 and 13.

The outlook for the remainder of the year is not especially bright as prices have started to decline. Moreover, India and Pakistan prefer to buy more copra than coconut oil in order to assist their crushing industries.

TOBACCO

GUATEMALA'S TOBACCO PRODUCTION AND IMPORTS HIGHER

Guatemala's 1951-52 tobacco production is estimated slightly above 1950-51 according to E. H. Miller, American Embassy, Guatemala. Imports of leaf tobacco during 1951 were 52 percent above 1950.

The country's 1951-52 tobacco production is estimated at 4,640,000 pounds as compared with 4,600,000 pounds in 1950-51. Imports of unmanufactured tobacco during 1951 totaled 750,580 pounds as compared with 435,944 pounds in 1950. The United States, the most important source, supplied 729,861 pounds. Turkey ranked second with 19,967 pounds and Cuba last with 752 pounds. In addition to leaf, Guatemala imported 5,198 pounds of cigarettes, 1,446 pounds of cigars and 928 pounds of smoking tobacco during 1951.

TROPICAL PRODUCTS

1951-52 WORLD COFFEE PRODUCTION REVISED DOWNWARD---
EXPORTS OF COFFEE DURING 1951 CALENDAR YEAR HIGHER 1/

The 1951-52 world coffee exportable production estimate is revised downward 9 percent below earlier forecasts. Total exports of coffee during 1951 calendar year were 9 percent above 1950.

The revised estimate of world coffee exportable production for 1951-52 is now placed at 29.3 million bags (132.3 pounds each) as compared with an earlier forecast of 31.7 million bags. The 1950-51 world exportable coffee production is estimated at 30.1 million bags and the 1949-50 exportable production is estimated at 29.3 million bags.

In addition to the 1951-52 world exportable coffee production, an estimated 8.3 million bags were produced for domestic consumption. This brings the estimated total world coffee production to 37.6 million bags as compared with 38.2 million bags during 1950-51 crop year. This decrease is primarily attributable to adverse weather conditions in some major producing areas.

Revised Brazilian exportable coffee production for 1951-52 is now placed at 14.3 million bags or 1.5 million bags below the 1950-51 estimate of 15.8 million bags. Exportable production in Colombia, the second largest coffee producing country in 1951-52, is estimated at 4.7 million bags or 0.2 million bags above the 4.5 million bags in 1950-51.

World coffee exports during the calendar year 1951 totaled 31.7 million bags as compared with the 1950 total of 29.0 million bags. Brazil, the largest coffee exporting country, exported 16.4 million bags. Colombia, the second largest country exported 4.8 million bags; the Dominican Republic ranked third with 1.1 million bags; Angola, fourth, with nearly 1.1 million; and French West Africa, fifth, with over 1.0 million bags. Of Brazil's total 16.4 million bags exported during 1951, the United States, the most important outlet, took 67 percent; France and Sweden ranked second with 4 percent each; Belgium, the Netherlands, and Argentina next with approximately 3 percent each. The remaining 16 percent was taken in varying quantities by numerous other countries.

A tentative unofficial forecast places total world coffee production for 1952-53 about 5 to 10 percent above 1951-52. This forecast may vary considerably as it was made on the assumption that favorable growing conditions will continue in the main producing countries. ---By Claude E. Dobbins based in part on Foreign Service reports.

1/ More detailed information on coffee production and imports is contained in a Foreign Agriculture Circular soon to be published by the Office of Foreign Agricultural Relations, U.S. Department of Agriculture, Washington 25, D.C. This, and other Circulars containing information regarding coffee and other tropical products not published in Foreign Crops and Markets are distributed to interested persons in the United States upon request through a special mailing list.

